

## Working Group 1: EU Production

### Draft Minutes

Wednesday, 29 January 2025 (10:00 – 13:30 CET)

Copa Cogeca (Meeting Room A), Rue de Trèves 61, 1040 Brussels

Interpretation in EN, ES, FR

Welcome from the Chair, Julien Lamothe

#### [Presentation](#)

Adoption of the agenda and of the last meeting's minutes (17.09.24): adopted

#### Action points

- **State-of-play of the action points of the last meeting – information**
- Fishers of the Future:
  - Members to express their interest, via email communication to the Secretariat, in representing the Advisory Council at the workshop of 20 September 2024
  - Members to provide their views, via email communication to the Secretariat, on the fishers' profiles, so that the selected representatives can express them at the workshop
    - Feedback received from OPP Burela and EAPO
    - MAC represented by the Secretary General at the workshop of 20 September 2024
- Landing Obligation:
  - Draft advice on “study supporting the evaluation of the Landing Obligation” to be put forward to the Executive Committee for consideration and potential adoption
    - Advice adopted on 19 September 2024
    - Letter of reply from DG MARE on 29 October 2024
- Sustainability Criteria for Fishery and Aquaculture Products:
  - Prior to the 18 September 2024 meeting of the Executive Committee, PACT'ALIM to submit their additional position on section 5 of the draft advice to the Secretariat
  - Draft advice on “development of fishery sustainability indicators by STECF” to be put forward to the Executive Committee for consideration and potential adoption
    - Following a written consultation of the Executive Committee, a new questionnaire was circulated to Working Group 1 from 30 October to 13 November 2024
    - Updated draft advice circulated on 2 December 2024
- Producer Organisations:
  - Secretary General to contact the other Advisory Councils about the potential interest in co-organising the workshop on Producer Organisations



- Workshop co-organised with the South Western Waters Advisory Council (28 January 2025)

## Annual Economic Report on the EU Fishing Fleet

- **Presentation of the 2024 edition by Raúl Prellezo (STECF EWG Chair)**

### [Presentation](#)

Raúl Prellezo (STECF EWG Chair) presented the findings of the 2024 edition of the STECF's Annual Economic Report on the EU Fishing Fleet. He noted that the Expert Working Group responsible for the report is co-chaired by Evelina Sabatella and himself, comprising over 50 experts. The Working Group, which meets twice a year, is supported by the Joint Research Centre (JRC) and is open to observers. Mr Prellezo expressed his gratitude to the MAC for its consistent participation, as an observer, and for the useful contributions.

Mr Prellezo explained that the 2024 edition of the report is based on 2022 as the baseline year, reflecting the most recent official data available from Member States. Historical trends were analysed by comparing the 2022 data with previous years, while projections were made for 2023 and 2024 through a "nowcasting" exercise. He highlighted the difficulties in projecting data given the market volatility caused by significant events such as the COVID-19 pandemic and the war in Ukraine.

Mr Prellezo provided an overview of the report's structure, which includes four main sections: an EU-level overview by activity, detailed chapters for each of the 22 coastal Member States, regional-level analyses covering the Baltic Sea, Northern Waters, the Mediterranean, and other areas, along with specific chapters for long-distance fleets and outermost regions. The final section presents the nowcasting projections.

On the EU overview, Mr Prellezo indicated that the general condition of the EU fishing fleet in 2022 showed a negative trend. Both catch volumes and revenues had decreased compared to 2021, alongside reductions in landings, gross value added (GVA), and gross profit. Net profit indicators, while still positive, were at their second-lowest recorded level. Employment within the sector had also declined, with full-time equivalent (FTE) indicators showing a 7% decrease. However, he noted a positive trend in the reduction of unpaid work, indicating improved working conditions. He outlined the drivers behind the observed economic downturn, noting the significant increase in fuel costs, which peaked in 2022 before starting to decline in mid-2023, as the primary driver. He acknowledged inflation as a contributing factor but added that this was not reflected in the report's graphs.

On the nowcasting exercise, Mr Prellezo presented projections for 2023, which anticipated a further decrease in landed weight alongside a slight fall in wholesale fish prices. The projected decrease in landed value is estimated at 9%, accompanied by an expected reduction in costs. As a result, the overall economic outlook for 2023 is projected to show slight improvement, particularly given that 2022 had been one of the most challenging years for the sector. For 2024, Mr Prellezo informed that the report forecasts a modest increase in landed weight, although prices are expected to remain lower than in 2022, leading to a slight decline in overall catch value. The financial outlook for the sector is expected to improve, primarily due to lower fuel prices, which have already fallen below



2022 levels. However, the number of vessels and employment figures are projected to continue their downward trend.

Addressing specific recommendations from the MAC, Mr Prellezo confirmed that the report now includes detailed calculations for various economic indicators, including short-term and long-term break-even points, as well as fuel use efficiency and intensity, expressed as percentages. He noted that this inclusion responded directly to the MAC's request for greater insights into the methodology used for economic assessments. On social variables, Mr Prellezo explained that while STECF sometimes receives social data from Member States, this information has not traditionally been incorporated into the economic report. Instead, a dedicated social Expert Working Group within the STECF is now analysing this data and is expected to produce its own annual social report. This approach will allow the economic report to remain focused on financial indicators, while social aspects are addressed through a separate, specialised analysis.

Another key recommendation from the MAC concerned the improvement of the nowcasting process. Mr Prellezo explained that projections currently extend to the first and second years following the baseline year (in the case of the current report 2023 and 2024, respectively). These projections are primarily based on the best available data, including EUMOFA statistics when Member State data is lacking. He expressed confidence in the robustness of these projections and noted that extending projections beyond three years (t+3) would not be reliable, as accurate and robust data is lacking.

The issue of small-scale fisheries (SSF), particularly vessels under 12 meters using active gear and not included in the SSF coastal fleets, was also addressed. Mr Prellezo reported that STECF had extracted relevant data and identified 4,223 vessels below 12 meters categorised within the large-scale fleet due to their use of active gear. He noted that this represents a significant portion of the fleet. Following discussions at the June 2024 meeting, where STECF highlighted the existing legally binding definition for SSF, members proposed considering the creation of a new segment for vessels under 12 meters using active gear. This proposal is currently under internal discussion within STECF. In the meantime, to enhance the representation of SSF, Mr Prellezo highlighted that the report now includes sub-groupings of vessels under 12 meters, categorised by region to provide more granular insights into their economic performance. This disaggregation allows for a clearer understanding of fleet dynamics across different areas.

Additional recommendations from the MAC included the provision of shortened tailor-made reports directed at the end-user for each Member State. Mr Prellezo confirmed that STECF is reviewing its approach to address this request. Another recommendation sought an assessment of the economic impacts of Brexit. Mr Prellezo explained that a comprehensive assessment would require a multi-faceted analysis beyond the scope of the annual economic report. However, he assured members that the matter would continue to be explored. Finally, the recommendation to conduct a systematic comparative analysis across the EU on fishing dependency was being addressed.

Further recommendations from other Advisory Councils included examining the origin of income, such as landings, subsidies, and the sale of fishing rights. Mr Prellezo noted that while STECF had conducted an analysis, the absence of robust quantitative data limited the depth of the assessment. Nevertheless, efforts are ongoing to address this recommendation more comprehensively.



Mr Prellezo highlighted several methodological changes made to improve the accuracy of the report. These include focusing only on active vessels, defined as those currently engaged in fishing activities. Out of approximately 75,000 vessels in the EU fleet, around 50,000 are considered active and were thus included in the analysis. Additionally, the baseline year inflation rate was adjusted to match the reference year, and net profit calculations were standardised using a fixed interest rate of 3.5%. Fuel intensity and efficiency indicators were calculated by segment, region, and Member State level to provide more detailed insights.

- **Exchange of views**

Mike Turenhout (Visfederatie) expressed concern regarding the continued decrease in landings, noting that this trend results in less raw material available from the EU for the processing industry. He inquired whether the fleet report includes recommendations on the optimal use of quotas, as around 1/3 of the allocated fishing quotas goes unused every year.

Raúl Prellezo (STECF EWG Chair) clarified that the Expert Working Group responsible for the report does not have a mandate to present recommendations. Mr Prellezo explained that the report does take quota utilisation into account. In the nowcasting exercise, the group not only considers the quotas themselves but also the historical usage patterns. For example, if only 50 tonnes of a specific quota were historically caught, this figure, rather than the full quota, is used in the projections. Mr Prellezo further noted that another STECF Expert Working Group was dedicated to the EU processing sector, examining the relationship between the processing industry and raw material availability. Nevertheless, not all Member States were submitting data on raw material.

The Chair expressed disappointment regarding the decrease in both landings and the number of fishing vessels, emphasising that the underutilisation of quotas is a widespread challenge. He stressed the need for action to optimise quota use across the EU, as inefficiencies in this area continue to affect the sector.

Sergio López García (OPP7 Burela) requested information about the accuracy of the nowcasting, wondering whether the forecasts presented in previous reports had aligned with actual outcomes. Mr López recognised the challenging context of high inflation and the war in Ukraine.

Raúl Prellezo (STECF EWG Chair) confirmed that an exercise had been undertaken to compare past forecasts with realised outcomes. The results were quite positive with the nowcasting method proving to be a reliable tool for capturing market trends. He noted that the nowcast for 2022 had predicted an extremely negative outlook, which was subsequently confirmed by the actual data. Mr Prellezo highlighted that while market uncertainties can affect outcomes, the methodology itself remains robust. The only significant deviation occurred in 2020, when the COVID-19 pandemic created unprecedented market disruptions, leading the Expert Working Group to focus on scenario-based analyses. In general, however, the forecasts were solid and reliable.

Laure Guillevic (WWF) inquired about the ongoing report on the social dimension of EU fisheries, asking which social data would be used and what the expected timeframe for the report's publication would be.





Raúl Prellezo (STECF EWG Chair) responded that the establishment of the responsible Expert Working Group would take place soon, though the exact date was still under discussion. He anticipated that the Expert Working Group would be established around May or June 2025, with the findings presented at the June 2025 meeting of the Plenary of STECF. He advised members to follow the STECF website for updates. Mr Prellezo further noted that he could not specify which indicators would be used or what data would be requested from Member States, highlighting that the overarching goal was to elevate the relevance of the social dimension within fisheries. He emphasised that experts within the STECF social Expert Working Group were working to ensure that social variables are appropriately integrated and analysed.

The Chair asked about the state-of-play for the questionnaire on Article 17 of the Common Fisheries Policy and social indicators, which had been circulated by the European Commission in the previous year. He recalled that the MAC had opted not to submit a collective reply, instead leaving it to individual members to provide input.

Gerd Heinen (DG MARE) indicated that he would follow up with the relevant colleague bilaterally and report back to the MAC on the current status of this initiative.

Pim Visser (NOVA), concerning the EU overview in the report, asked about the deviation of the findings across the Member States.

Raúl Prellezo (STECF EWG Chair) acknowledged that there are significant variations, particularly across regions. He emphasised that the regional data provided a good holistic view, and highlighted that the Baltic region was experiencing considerable challenges and doing poorly. He concluded by noting that substantial differences persisted both across Member States and between regions.

- **Way forward**

The Chair suggested to proceed with a questionnaire to the members to collect feedback on a future advice on the Terms of Reference of the next economic report on the EU fishing fleet. The Chair recognised the importance of proceeding promptly, as the Terms of Reference would be set by the European Commission in early 2025. He suggested to include a recommendation on improving the alignment of scientific and economic advice, as progress had been limited.

### European Market Observatory for Fisheries and Aquaculture (EUMOFA)

- **Overview of 2025 work programme by Commission representative (MARE A4)**

#### Presentation

Laurène Jolly (DG MARE) provided an overview of the 2025 EUMOFA work programme, highlighting recently published reports and upcoming studies. Ms Jolly informed that EUMOFA had recently released the EU Fish Market 2024 report as well as a price structure analysis on smoked salmon in France, Poland, and Germany. Several species profiles were updated for both fisheries and aquaculture.



Regarding the studies and publications planned for 2025, Ms Jolly announced that the Blue Bioeconomy Report, which is published biennially, will primarily focus on algae and would be released in the next month. Three price structure analyses were also planned, covering sole, hake, and anchovy. Furthermore, thematic studies were foreseen on the digitalisation of selling methods at first sale, completing previous report published on digitalisation at consumer level. Additional thematic studies would explore market trends for tuna products and potentially examine the EU wholesale sector.

Ms Jolly also highlighted the planned update of the biennial analysis on the non-food use of fishery and aquaculture products in the EU as well as the undertaking of a study, as previously requested by the MAC, to better understand consumer behaviours. The EU Eurobarometer survey on consumer habits regarding fishery and aquaculture products was scheduled for publication in February 2025. In addition, DG MARE is exploring possibility for a study on trade and dependency on specific countries of origin, aiming to identify the primary import sources and potential alternative suppliers.

Regarding upcoming events, Ms Jolly informed members that EUMOFA would have a stand at the North Atlantic Seafood Forum in Bergen from 4 to 6 March 2025, followed by participation in the Seafood Expo Global from 6 to 8 May 2025. She also mentioned a free conference titled “From Sea to Shelf: Unpacking Consumer Behaviour and Market Trends in Sustainable Fisheries” at Seafood Expo Global. Finally, EUMOFA will hold a stand at the European Maritime Day, scheduled for 21 to 23 May 2025 in Cork.

- **Exchange of views**

Pim Visser (NOVA) welcomed the planned study on the digitalisation of selling methods at first sale. He highlighted that the EU possesses a wealth of expertise in this area, as some stakeholders have worked on this topic for decades. He offered the support of his network to facilitate the study, emphasising that conducting it through the market would be highly efficient. He expressed hope that the study would yield more effective results than the previous Fishers of the Future initiative.

María Luisa Álvarez Blanco (FEDEPESCA) asked about the date for the planned EUMOFA workshop at the Seafood Global Expo.

Laurène Jolly (DG MARE) responded that the presentation date had not yet been confirmed. Ms Jolly assured that this information would be communicated to the Secretariat once available<sup>1</sup>.

Adrien Simonnet (UMF) echoed Mr Visser’s remarks, expressing satisfaction with the planned study on digitalisation and first-sale practices. Mr Simonnet expressed his willingness to support the development of this work, emphasising the value of collaborative efforts in ensuring a comprehensive and practical outcome.

The Chair recalled that, under a previous advice on the work programme of EUMOFA, the MAC requested studies on saithe and clams. The MAC had also requested further studies on sustainability approaches and consumer perceptions.

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<sup>1</sup> Tuesday, 6 May 2025, 12:15 – 13:00



Laurène Jolly (DG MARE) confirmed that, if the studies on saithe and clams had been overlooked, these would be included in the 2025 work programme. Regarding sustainability approaches, she explained that this topic was partially covered by the Eurobarometer survey and could also be addressed through the upcoming EUMOFA consumption study.

Mike Turenhout (Visfederatie) asked about the timeline for the publication of the study on non-human consumption of fishery and aquaculture products.

Laurène Jolly (DG MARE) informed that, as work had not yet commenced, the tentative publication date was set for the end of 2025.

The Chair encouraged members to share any opinions or insights regarding the planned price structure analyses for hake, saithe, and anchovy, noting that member contributions would be valuable in shaping the studies.

Pim Visser (NOVA) drew attention to significant challenges facing the sole market, particularly the dramatic drop in sole quotas for 2024 and the corresponding reduction in the Dutch fleet targeting sole. He emphasised that these factors should be carefully considered in the context of the planned study, as the current instability in the sole market requires a nuanced approach.

The Chair supported this observation, noting that France was also experiencing challenges related to sole production, largely driven by market conditions.

- **Way forward**

The Chair suggested, as a way forward, that the Secretariat would circulate, later in the year, a questionnaire requesting feedback from the members on the work programme of EUMOFA, which would serve as basis for future advice.

### Sustainability Criteria for Fishery and Aquaculture Products

- **Update on the testing of the sustainability criteria tool by Gerd Heinen (MARE A4)**

Gerd Heinen (DG MARE) recalled that, several years ago, the STECF started working on the development of sustainability indicators for fishery and aquaculture products through the establishment of three Expert Working Groups. Following the identification of two lead indicators for wild caught products (effect of fishing activities on the seabed, status of the target stock), a scoring system (A-E grading) was developed, based on traceable and verifiable information. An IT service contractor developed the tool, keeping in mind user-friendliness. User inputs parameters for the tool are based on the mandatory information under the Common Market Organisation Regulation and on information available on the packages of fishery products.

Mr Heinen emphasised two critical aspects of the tool. Firstly, it will allow for the scoring of imported products, ensuring that sustainability assessments are not limited to EU-produced goods. Secondly, the indicators are fully traceable, enhancing transparency throughout the supply chain. He highlighted that the sustainability criteria tool requires three key input parameters: the species name,



the type of fishing gear used, and the catch area. These parameters align with the mandatory information required under the Common Market Organisation Regulation.

Mr Heinen informed that an internal testing phase by experts had been conducted, yielding positive results. Following this initial phase, the tool was shared more widely, including with MAC members, who were invited to participate in user testing. The user testing phase was scheduled to run for two weeks, with a soft deadline set for 7 February 2025. Participants were expected to submit their views through a structured feedback template, which would be compiled and analysed by the tool's contractors. He added that, once the user feedback had been aggregated and reviewed, further information on the tool's performance and potential refinements could be presented at a future meeting of the MAC.

- **Exchange of views**

María Luisa Álvarez Blanco (FEDEPESCA) informed that she had volunteered to test the tool. Ms Álvarez highlighted that the tool would only apply to unprocessed products. Therefore, as these products do not have packaging, the mandatory information would only be available at the store, so consumers would not always have access to the necessary details.

Gerd Heinen (DG MARE) responded that the tool could be used for processed products, but that, since the mandatory requirements of the Common Market Organisation Regulation did not apply, the necessary input information might not be available to the consumers. Mr Heinen recognised that, in the case of unpacked products, fishmongers made the information available, but that it was not available at home. He added that, at a later stage, the European Commission could consider the development of a mobile application to allow the consultation of the tool at the point of sale.

Stefan Meyer (Bundesverband Fischindustrie) expressed his availability to participate in the testing of the tool. Mr Meyer asked for confirmation that STECF had not originally planned for their work to be used in a consumer-facing manner. He expressed concern that the tool was being developed without the prior evaluation of the Common Marketing Organisation Regulation.

Gerd Heinen (DG MARE) expressed availability to include Mr Meyer in the testing. Mr Heinen explained that, since the beginning, the aim was to develop an instrument to be used on a voluntary basis. The Commission representative added that the tool would not be part of a potential revision of the Common Market Organisation Regulation.

Pim Visser (NOVA) underscored that the marketing indicators worked primarily in a business-to-business scale, with limited relevance to consumers. In his view, the sustainability indicators should focus on the transfer of information across the different stages of the supply chain, with auctioneers serving as intermediaries. Therefore, it was not necessary to involve the producers. Mr Visser expressed concern about the continued inclusion of freshness indicators within the framework of the Common market Organisation, requesting further information on the future of these standards.

Gerd Heinen (DG MARE) clarified that the sustainability indicators, which would be available through a voluntary information tool, would be completely separate from the marketing standards. Both operators and consumers would be able to use this information, but there would be no regulatory





implications. As for the freshness criteria under the marketing standards framework, Mr Heinen recognised that these had a business-to-business perspective. Previous consultations and assessments showed that the standards for preserved sardines and for preserved tuna and bonito were useful. The level of effectiveness of the freshness standards could be an aspect to be assessed in the evaluation of the Common Market Organisation, with the due involvement of the MAC in terms of possible policy options.

Pim Visser (NOVA) argued that the marketing standards were outdated and no longer fit for purpose. Therefore, these should be removed from the EU's legislative framework.

Gerd Heinen (DG MARE) responded that he took note of the comment.

Alessandro Manghisi (ASC) expressed availability to be part of the testing of the tool. Mr Manghisi asked for information on how the tool aligns with two projects funded under the HORIZON programme with similar aims: Verifish and Mr GoodFish 3.0. He also wondered whether the tool would be compliant with the Green Claims Directive, given its consumer-facing nature.

Gerd Heinen (DG MARE) expressed availability to include Mr Manghisi in the testing phase. Mr Heinen explained that, while the Verifish project is linked, it has a broader scope and covers a wider range of indicators, including social indicators. The Commission representative recognised the importance of consistency across projects, adding that DG MARE was collaborating closely with the relevant consortia to achieve alignment. Regarding the Green Claims Directive, he confirmed that DG MARE is working alongside DG ENV to ensure the tool adheres to the directive's requirements.

María Luisa Álvarez Blanco (FEDEPESCA) expressed concern about the evolving aims of the work of STECF, as there was previously expectation of sustainability label in the context of the Sustainable Food Systems Framework. Ms Álvarez argued that consumer information should be provided regardless of the type of food product and the place of consumption. In her view, the development of a tool only for non-prepacked fishery products could be discriminatory. She added that, in the EU, there was an increase in the consumption of processed products, particularly in the context of the HORECA sector. In Northern Europe, there were few fishmongers.

Gerd Heinen (DG MARE) recognised that the initiative was initially part of a review of the marketing standards framework for fishery and aquaculture products. Afterward, the initiative was removed from this framework, so that it could be integrated into the Sustainable Food System Framework. Nevertheless, further work is needed before any eventual establishment of a comprehensive sustainability labelling system. Mr Heinen recalled that there was consumer interest in specific fishery indicators, such as status of the stock. In his view, the tool could be an opportunity to provide transparency on the good sustainability status of certain fishery products.

María Luisa Álvarez Blanco (FEDEPESCA) called for a fair treatment across the market, instead of a continuous focus on a type of products and a type of sales.

Patrick Murphy (IS&WFPO) wanted to know how the tool would address situations of countries exceeding their allocated quotas, as was the case of Norway with mackerel catches.



Gerd Heinen (DG MARE) explained that the indicators depended on the status of the stocks. The tool was designed to be dynamic and would be updated annually to reflect new data.

Àngels Segura Unió (AECOC) asked whether the tool would incorporate social sustainability criteria, arguing that any tool addressing sustainability should cover social aspects alongside environmental ones.

Gerd Heinen (DG MARE) explained that the tool focused on specific aspects, not on an overall sustainability score. The tool would inform on fisheries-specific environmental aspects – seabed impact and status of target stock. Mr Heinen asked the members to inform him, especially those involved in the testing phase, if they felt that the tool was misrepresented.

- **Consideration of new proposal of draft advice on the development of fishery sustainability indicators by STECF**

The Chair provided an overview of the draft advice on “Development of Fishery Sustainability Indicators by STECF”. Under section 2 “Indicators on the stock status, on the bycatch of sensitive species, and on the impact on the seabed”, the text reaffirmed the importance of addressing the three pillars of sustainability (environmental, social, and economic) and that the tool should acknowledge any gaps in this regard. The text also called for the consultation of the other Advisory Councils. The Chair explained that section 3 was about the coverage of aquaculture products.

Gaëtane Le Breuil (European Fishmeal) suggested an amendment to the second paragraph of section 3, replacing the reference “feed and fishmeal” with “feed from aquatic resources and terrestrial resources”.

Javier Ojeda (FEAP) requested information on the development of specific sustainability indicators for aquaculture products.

Katarina Sipic (AIPCE-CEP) asked for the inclusion of AIPCE and CEP in the second separate position outlined in section 4 “coverage of prepared and preserved products”.

Alessandro Manghisi (ASC), in the context of section 5 “Social and economic pillars of sustainability”, wondered about the relevance of reference the 16 environmental impact categories of the Life Cycle Assessment approach. In his view, it would be more appropriate for the text to refer to other external standards, such as the guidelines of the OECD.

The Chair acknowledged the need for clarity and proposed either being exhaustive in listing standards or omitting specific references altogether.

Pierre Commère (PACT’ALIM) recommended removing the reference to the 16 categories while retaining a general reference to Life Cycle Assessment. Mr Commère argued that if the goal is to integrate fisheries within broader food systems frameworks, it would be essential to align the language with commonly used terminology in that context.

Alessandro Manghisi (ASC) suggested that the European Sustainability Reporting Standards could be referenced instead of the OECD guidelines.



The Chair expressed agreement with the maintenance of a more general reference to the methodology of the Life Cycle Assessment.

María Luisa Álvarez Blanco (FEDEPESCA) asked to not include her organisation in the list of organisations supporting the separate position described in the second paragraph of section 7 “use of the tool”.

Guus Pastoor (Visfederatie) recalled that, in accordance with the Rules of Procedure, positions expressed by only one member should be recorded on a footnote, while views from various members should be recorded in the main text.

The Secretary General confirmed that was the case. The location of the positions would depend on the number of expressions of support.

Laure Guillevic (WWF) expressed support for the separate position described in the second paragraph of section 7.

Vanya Vulperhorst (Oceana) stated that, unfortunately, the planned legislative proposal on a Sustainable Food System Framework would not move forward. Therefore, in the context of the evaluation of the Common Market Organisation and potential revision, the MAC should hold discussions on the integration of sustainability criteria.

Christine Absil (Goodfish) asked to record the support of her organisation for the separate position described in the second paragraph of section 7.

Roberto Alonso (ANFACO-CECOPESCA) expressed availability to work together with Conxemar for the development of a common position under section 7.

Janne Posti (Conxemar) confirmed the availability of his organisation.

Katarina Sipic (AIPCE-CEP) informed that her organisation would work together with ANFACO-CECOPESCA and with Conxemar.

Vanya Vulperhorst (Oceana) suggested amending recommendation (a) to remove the reference to the Sustainable Food System Framework, as the initiative was no longer moving forward at the political level, according to remarks by Commissioner Hansen.

The Secretary General suggested to instead add a footnote recognising that the legislative proposal would no longer be tabled and expressing a commitment to exchanging on the relevance of the inclusion of criteria to measure environmental and social sustainability in fishery and aquaculture products under the Common Market Organisation Regulation.

The Chair asked Ms Vulperhorst why, via the preliminary feedback submitted prior to the meeting, Oceana wanted to remove the reference to “economic” in recommendation e).

Vanya Vulperhorst (Oceana) argued that, while there was a broad consensus on the importance of covering social aspects, the economic aspect was only mentioned once in the advice.



Roberto Alonso (ANFACO-CECOPECA), regarding the reference to the Sustainable Food System Framework, argued that a strong food framework continued to be an area of focus for the Commission. Regarding recommendation e), Mr Alonso disagreed with the deletion of the reference to economic sustainability. In his view, under the current mandate, the European Commission should consider issues such as affordability and competitiveness.

Stefan Meyer (Bundesverband Fischindustrie) expressed concern about the use of the term “expert” withing the recommendations. Mr Meyer exemplified that, recently, in Germany, a fisheries expert had publicly criticised recommendations from WWF and Verbraucherzentrale, leading to confusion among consumers and operators. In his view, the recommendations, should refer to institutional expertise.

Patrick Murphy (IS&WFPO) expressed concern that references to institutional expertise would exclude individuals, such as fishers, who possess substantial industry expertise but lack institutional affiliation.

Alessandro Manghisi (ASC) argued that a reference to “institutional” would be unclear. In his view, expertise could come from various sources outside of academic or institutional frameworks, as many independent experts provided highly accurate and valuable information. Mr Manghisi emphasised the importance of covering economic indicators, especially under the current unpredictable market situation. In his view, it was increasingly important to consider food affordability and competitiveness.

Christine Absil (Goodfish) expressed agreement with Mr Manghisi.

The Secretary General recalled that the European Commission tasked STECF with the establishment of working groups composed of experts. Therefore, it would make sense to use the same terminology.

Juan Manuel Trujillo Castillo (ETF) underscored that references to sustainability should encompass the three pillars, in alignment with the Common Fisheries Policy. Mr Trujillo argued that it was important to recognise the role of widely acknowledged fisheries experts from various institutions, while appropriately valuing individual expertise.

Guus Pastoor (Visfederatie) called for the inclusion of economic considerations under recommendation e)

Pierre Commère (PACT'ALIM) suggested to refer to “collective” and “expertise” instead of “experts”.

Vanya Vulperhorst (Oceana) reaffirmed her view that economic aspects should be removed from recommendation e), since this aspect was not substantially reflected in the main text.

The Chair argued for the maintained of the reference to economic considerations in the recommendation.

*The Working Group expressed agreement with the amended draft advice on the development of sustainability indicators by STECF.*

- **Way forward**





The Chair proposed to put forward the draft advice to the Executive Committee for consideration and potential approval. The draft would include the separate position to be indicated by AIPCE, ANFACO-CECOPESCA, CEP, and Conxemar under section 7.

## Common Market Organisation

- **Presentation on the section on Producer Organisations of the ongoing study on the Common Market Organisation commissioned by DG MARE by the external consultant**

### Presentation

Séverine Renault (AND International) presented an overview of the ongoing study on the CMO, commissioned by DG MARE, outlining the study's objectives and sharing preliminary results from the first stage of the project.

Ms Renault provided background information, explaining that the study followed the publication of the European Commission's report on the 2013 reform of the CMO. That report had identified several weaknesses, including issues surrounding the identification of Producer Organisations. The study's primary objective was to evaluate the efficiency of the reform and develop concrete, applicable recommendations. Additionally, the study seeks to highlight possible improvements to the Common Market Organisation Regulation, taking into account other relevant frameworks such as the Common Fisheries Policy, the Trade and Market Regulations, and the Common Agricultural Policy.

Ms Renault outlined the general approach of the study, which involves multiple phases of data collection and analysis. The project was midway through the data collection phase, with the analysis of the first stage already underway. As part of this process, an online survey was launched across 18 Member States. The assessment of the general presentation of Producer Organisations is nearly complete, with further analysis ongoing regarding the governance and functioning of these organisations. On the timeline, Ms Renault explained that the project launched in September 2024, with initial data collection beginning in mid-October. The national authority survey would continue until mid-March 2025. She also introduced the project team responsible for the study.

Ms Renault provided details on the data collection plan, which included four primary tools alongside a validation workshop. Interviews were conducted at both the EU and national levels, involving representative organisations across different sectors, consumer associations, NGOs, and relevant EU staff from various Directorates-General. Additional complementary interviews with national authorities could also be scheduled. Ms Renault informed that the online survey on Producer Organisations, a key component of the data collection process, had concluded. Of the 226 target organisations identified, 182 valid email addresses were found. A total of 53 responses were received, representing a response rate of 23%. The survey was translated into all EU languages and included questions on the organisation's profile, main missions and activities, membership structure, funding sources, and production data. She provided details on the survey to national authorities, which was launched in November 2024. This survey comprised three sections and would continue until mid-March 2025.



Ms Renault informed that case studies on Producer Organisations would begin soon. The selection criteria would ensure coverage across both fisheries and aquaculture. Within the fisheries sector, case studies would include small-scale fisheries, high-seas fisheries, and mixed fisheries, while aquaculture case studies would cover finfish farming, marine aquaculture, and shellfish farming. The selection process for case studies accounted for diversity in the size of Producer Organisations, alongside willingness and motivation to participate, with priority given to Producer Organisations that had responded to the initial survey. The case study reports would be structured to cover the national context, membership, governance, and other relevant aspects. She outlined the structure of the validation workshop, scheduled for mid-April 2025, which would provide an opportunity to review the study's findings with stakeholders.

Sharing preliminary results from the survey, Ms Renault noted that the 23% response rate reflected a good geographic distribution and diversity of sectors and organisational sizes. Responses covered all maritime basins and included both fisheries and aquaculture Producer Organisations, providing a representative sample. The results highlighted the wide range of missions and activities undertaken by Producer Organisations, along with their perspectives on how the 2013 Common Market Organisation reform had affected their operations. The share of national production managed by Producer Organisations was found to vary significantly across Member States and sectors, with five coastal Member States having no Producer Organisations for fisheries. Among Member States with established Producer Organisations, the proportion of national catch managed by Producer Organisations ranged from 19% to 100%.

Ms Renault concluded by outlining the study's next steps. These include continued stakeholder engagement and interviews through mid-March 2025, followed by the validation workshop in April. She encouraged any Producer Organisations that had not yet been contacted to reach out and participate in the study.

- **Exchange of views**

Jérémie Souben (FEDOPA) commented the difficulties for Associations of Producer Organisations in answering the survey, as it was rather detailed and directed at individual Producer Organisations. Mr Souben signalled his interest in following the results of the study.

Séverine Renault (AND International) acknowledged the issue, explaining that the study aimed to include all stakeholders, even if the questions were not all relevant for every single one. Ms Renault informed that additional interviews would be conducted to ensure that the perspectives of Associations of Producer Organisations were accurately and comprehensively captured.

The Chair expressed surprise that obtaining valid email addresses for Producer Organisations had proven challenging. The Chair suggested that communication channels should be streamlined through the European Commission and emphasised the need for improvements in this area to facilitate more effective outreach in future studies. He wondered how a study could be launched without having accurate contact information to ensure full participation.



Séverine Renault (AND International) explained that the primary challenge stemmed from GDPR-related restrictions, which complicated the collection and sharing of contact details. Ms Renault added that the contact list initially provided by the Commission was not fully up to date.

Gerd Heinen (DG MARE) explained that the Commission's website includes a list of Producer Organisations with contact details. Nevertheless, these details could be outdated. Mr Heinen emphasised that the Commission services continuously encourage the Member States to update the list, but that such updates are not consistently provided.

Laurène Jolly (DG MARE) commented that the ratio of response could also indicate that some Producer Organisations lack the resources to respond within the timeframe provided.

### Producer Organisations

- **Exchange of views about the workshop on Producer Organisations (28 January 2025)**

The Chair informed that, following the workshop held on 28 January 2025, a report would be prepared. The Chair highlighted the significant input received through the breakout sessions, which would serve as a basis for a draft advice on Producer Organisations to be developed together with the South Western Waters Advisory Council.

Joe Emmanuel Seck (France) expressed satisfaction for the opportunity to identify points of divergence and convergence across Member States, particularly on the Production and Marketing Plans. Mr Seck expressed availability from the French authorities to strengthen cooperation with other Member States to identify common solutions to further streamline the plans.

The Chair recognised that the various case studies at the workshop revealed both commonalities and differences across the EU. He emphasised the importance of further examining these matters through the future recommendations to the European Commission and the Member States.

Javier Ojeda (FEAP) congratulated the organisers on the successful workshop, highlighting the value of the high level of participation from Member State authorities and sector representatives. Mr Ojeda mentioned the importance of national authorities being aware of the challenges faced by aquaculture Producer Organisations.

The Chair thanked all participants and organisers for their contributions to the workshop.

- **Way forward**

The Chair recalled that a workshop report would be circulated in the near future. Based on the feedback from the workshop's breakout sessions, a draft advice would be prepared for consideration at the next meeting.

### AOB

None.



## Summary of action items

- Annual Economic Report on the EU Fishing Fleet
  - Secretariat to circulate a questionnaire to the members to collect feedback, which will serve as a basis for a future draft advice on the Terms of Reference of the next edition of the Annual Economic Report on the EU Fishing Fleet.
- European Market Observatory for Fisheries and Aquaculture (EUMOFA)
  - Later in the year, Secretariat to circulate a questionnaire to the members to collect feedback, which will serve as a basis for a future draft advice on the work programme of EUMOFA for 2026.
- Sustainability Criteria for Fishery and Aquaculture Products
  - Draft advice on “Development of Sustainability Indicators by STECF” to be put forward to the Executive Committee for consideration and potential adoption.
- Producer Organisations
  - Secretariat to circulate a report of the workshop held on 28 January 2025.
  - Draft advice on producer organisations, based on the contributions from the workshop’s breakout sessions, to be considered at the next meeting.

DRAFT





## Attendance List

Representative	Organisation	Role
Alen Lovrinov	Producer Organisation Omega3	Member
Alessandro Manghisi	Aquaculture Stewardship Council (ASC)	Member
Alonso Abreu Lozano	Asociación de Armadores Punta del Moral (OPP80)	Member
Amélie Laurent	Oceana	Member
Àngels Segura Unió	AECOC	Member
Anna Rokicka	Polish Association of Fish Processors (PSPR)	Member
Aodh O'Donnell	Irish Fish Producers Organisations (IFPO)	Member
Arthur Yon	FROM Nord	Member
Caroline Gamblin	PACT'ALIM	Member
Christine Absil	Good Fish Foundation	Member
Daniel Voces	Europêche	Member
David Milly	OP Pêcheurs d'Aquitaine	Observer
Dominic Rihan	Killybegs Fishermen's Organisation (KFO)	Member
Fabijan Hrvatin Peronja	Ribarska Zadruga Friška Riba	Member
Gaetane Le Breuil	European Fishmeal	Member
Garazi Rodríguez	APROMAR	Member
Gemma Laso	Inxenia	Observer
Gerd Heinen	European Commission	Expert
Giuseppe Scordella	COPA-COGECA	Member
Guus Pastoor	EU Fish Processors and Traders Association (AIPCE) / European Federation of National Organizations of Importers and Exporters of Fish (CEP)	Member
Hommel Kassa	Syndicat National du Commerce Extérieur des produits congelés et surgelés (SNCE)	Member
Isabel Alonzo Cabezas	Spain	Observer
Jacinta María Ramírez Ramírez	OPP72	Member
Janne Posti	Conxemar	Member
Jarek Zieliński	Polish Fish Producers Association (PFPA)	Member



Representative	Organisation	Role
Javier Ojeda	Federation of European Aquaculture Producers (FEAP)	Member
Jean-Marie Robert	Les Pêcheurs de Bretagne	Member
Jens Hons Mathiesen	Danish Seafood Association	Member
Jérémie Souben	FEDOPA	Member
Joanna Żurawska-Łagoda	Poland	Observer
João Pereira	FRUCOM	Member
Joe Emmanuel Seck	France	Observer
John Lynch	Irish South and East Fish Producers Organisation (ISEFPO)	Member
José Basilio Otero Rodríguez	Federación Nacional de Cofradías de Pescadores (FNCP)	Member
José Carlos Escalera Aguilar	FECOPESCA	Member
Juan Manuel Trujillo Castillo	ETF	Member
Juana Parada	OR.PA.GU.	Member
Julien Lamothe	European Association of Fish Producers Organisations (EAPO) / ANOP	Chair
Juliette Marguerite	European Salmon Smokers Association (ESSA)	Member
Jules Danto	European Association of Fish Producers Organisations (EAPO)	Member
Justyna Radzewicz	Poland	Observer
Katarina Sipic	EU Fish Processors and Traders Association (AIPCE) / European Federation of National Organizations of Importers and Exporters of Fish (CEP)	Member
Laure Guillevic	WWF	Member
Laurène Jolly	European Commission	Expert
María Luisa Álvarez Blanco	FEDEPESCA	Member
Mariano García García	Federación Andaluza de Cofradías de Pescadores	Member
Maximilian Schwarz	Market Advisory Council (MAC)	Secretariat
Mike Turenhout	Visfederatie	Member
Pablo Cadarso	CONXEMAR	Member
Patrick Murphy	Irish South & West Fish Producers Organisation	Member





Market Advisory Council

Representative	Organisation	Role
Pedro Reis Santos	Market Advisory Council (MAC)	Secretariat
Pierre Commère	PACT'ALIM / Eurothon	Member
Pim Visser	NOVA	Member
Poul Melgaard Jensen	Danish Seafood Association	Member
Raúl Pallezo	STECF	Expert
Roberto Alonso	ANFACO-CECOPECA / FECOPECA	Member
Sarah Hautier	EuroCommerce	Member
Sergio López García	OPP7 Burela	Member
Séverine Renault	AND International	Expert
Stefan Meyer	Bundesverband der deutschen Fischindustrie und des Fischgrosshandels e.V.	Member
Thibault Pivetta	European Molluscs' Producers Association (EMPA)	Member
Vanya Vulperhorst	Oceana	Member
Xavier Pires	ALIF	Member
Szilvia Mihalfy	Federation of European Aquaculture Producers (FEAP)	Member
Yannis Pelekanakis	HAPO	Member
Yobana Bermúdez Rodríguez	EU Fish Processors and Traders Association (AIPCE) / European Transport Workers' Federation (ETF) (via proxy)	Member
Yves Reichling	FeedbackEU	Member

